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# **Theorising middle class consumption from the global South: a study of everyday ethics in South Africa's Western Cape**

## **Abstract**

Emerging research on the increasing significance of consumption in the global South is concerned with its links to the globalizing middle classes. Against the backdrop of optimism invested in the new global middle classes to fuel consumption-led growth, this paper contributes to new debate about the articulations and significance of ethical consumption in the global South. Missing from much current mainstream policy, media and academic debate is acknowledgement of the diversity of the global middle classes and an understanding of how ethical interpretations and behaviour differ in various consumer markets around the world. In response, this paper draws on qualitative research in South Africa's Western Cape to explore the cultural significance of everyday ethical realities in shaping consumption in the global South. In addition to addressing the relative absence of research into ethical consumption in global South contexts, the paper makes two key contributions based on our findings. First, it challenges the tendency, particularly in economic discourses, to generalise about the 'new' global middle class consumers by highlighting the significance of locality and context in shaping consumption practices in the Western Cape; specifically it finds that, for diverse middle class consumers, thrift is an important ethical choice and practice determining consumption patterns. Second, it highlights the significance of everyday ethical practices in shaping consumption in the Western Cape, focusing specifically on how thrift is imbricated in concerns with not just economic constraint, but also care, habit and aspiration. The paper concludes with reflections on the wider implications of these findings and suggests that they illustrate a need to theorise ethical consumption from contexts in the global South, on their own terms.

**Key words:** thrift, ethical consumption, care ethics, New African Consumer, South Africa, middle class

## 1. Introduction

This paper explores the significance of everyday ethics in shaping consumption in the global South, with a specific focus on middle class consumers in South Africa's Western Cape. Recent years have witnessed a burgeoning interest in the rise of the global middle classes. While economists cannot agree on precisely who constitutes the global middle classes or how they should be measured,<sup>1</sup> they tend to agree that there is currently an escalation, particularly in developing countries, in the numbers of people who are experiencing an expansion of income and increased spending power. Of particular interest to many commentators is the nature and potential of middle class consumption. Through a study of middle class ethics and consumption practices in South Africa, this paper responds to a need for further empirical investigation to broaden understanding of ethical consumption in the global South, with an explicit focus on everyday ethical practices. It addresses three problems in the ways in which the global middle classes and consumption are understood: first, the tendency, particularly in economic discourses, to generalise about 'new' global middle class consumers; second, the relative absence of research into ethical consumption in global South contexts; third, the tendency in what little research exists on ethical consumption in the global South to focus on conspicuous or socially visible acts, and on ethical consumption as narrowly-defined social and environmental responsibility, rather than everyday ethical practices.

The paper's starting point is that all forms and practices of consumption are in some way influenced by moral considerations, including care for the self and proximate others, as well as financial responsibility (Mansvelt, 2005; Sayer, 2003). It builds on some of the more nuanced and contextualized understandings of middle class consumers to consider how consumption is shaped by ethical practice and how South Africa's diverse middle class consumers deal with the ethical dilemmas embedded in many of their everyday purchasing decisions. It recognises that negotiating these dilemmas is influenced by the considerable diversity in relative affluence and purchasing power that exists between people routinely categorized as middle class, but

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<sup>1</sup> Opinion is divided on using absolute global or relative definitions for each country, and using measures of income or expenditure. For example, Easterly (2001) defines middle class as those lying between the 20<sup>th</sup> and 80<sup>th</sup> percentile on the consumption distribution; Birdsall et al. (2000) define middle class as those between 75 and 125 percent of median per capita income; Banerjee and Duflo (2008) use household daily per capita expenditure valued at purchasing power parity between \$2 and \$10; Kharas (2010) defines a global middle class as all those living in households with daily per capita incomes of between \$10 and \$100.

demonstrates that in the context of South Africa similarities in ethical practice exist across this diversity. The paper thus seeks to problematise the discursive binary of ‘traditional’ and ‘new’ middle classes (Fernandes 2006; Kharas and Gertz 2010) and the assumptions made about how they do or do not conform to the ethical expectations of both mainstream and critical analysts (Lange and Meier 2009).

The paper draws on research conducted between July 2013 and June 2014 into ethical retailing and consumption in South Africa’s Western Cape. The methodology involved 10 focus groups, supported by 21 interviews with local institutional actors<sup>2</sup>, to examine middle class attitudes and consumption practices in the region. The focus groups were conducted in numerous locations to explore the ways in which consumers understand, rationalise and respond to ethical consumption in the context of their everyday lives (Barnett et al. 2011). Participants were asked about their everyday consumption practices and what informs their choices, rather than about ethics directly, which elicited discussion primarily about food and household provisions.

Participants were recruited via two local fieldworkers and three key informant interviewees. The Western Cape is demographically diverse in terms of ethnicity, culture, language (mainly Afrikaans, English or isiXhosa), socio-economic status and levels of urbanization. Seven of the focus groups capture insights from across the diversity of South Africa’s middle-classes and provide most of the data for this paper. This includes three groups in Cape Town (one in the city centre and two in the suburb of Newlands) all at places of work and with participants who live in various locations around the city; it also includes one group each in Hermanus (south-east of Cape Town), Bredasdorp (in the Agulhas Plain), Croydon (near Somerset West) and Cloetesville (near Stellenbosch), primarily with participants resident in these areas (see Figure 1). The groups in Hermanus and Bredasdorp comprised people who might be termed ‘traditional’ (predominantly white) middle class; the groups in Cape Town were mixed ‘traditional’ and ‘new’ (with the latter including those who identify as both black and Coloured). We also include findings from one of three focus groups with men and women (in this case, labourers and flower pickers in Elim in the Agulhas Plain) who would be considered middle class on some measures (e.g. AfDB 2011), but not in the context of South Africa (the

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<sup>2</sup> These included consultancy firms, mainstream retailers of ethically-labelled products, pioneers and marketers of sustainably produced goods, high-end restaurants using ethically sourced ingredients, non-governmental organizations (NGOs) responsible for ethical initiatives, ethical trade multi-stakeholder organizations and industry associations.

discursive construction of the global middle classes and measures used to define middle class in South Africa are discussed further below)<sup>3</sup>. The focus groups were conducted in participants' first language or, where groups were mixed, in either English or Afrikaans; all were recorded and transcribed and, where required, translated into English.

The paper begins by illustrating the problematic ways in which the 'new' global middle classes are often discursively constructed by the business world and popular media, specifically in relation to consumption. It then challenges the tendency towards generalization in these discourses by exploring the nature and complexity of those groups in South Africa now defined as middle class. Drawing on our research findings, the paper explores everyday ethical choices and decision-making that influence consumption patterns in the Western Cape. Our findings suggest that, despite diversity among our middle class participants, there are similarities in ethical decision-making informing consumption patterns and attempts to draw crude distinctions between 'traditional' and 'new' middle classes are not particularly helpful in understanding this. Specifically, it appears that *thrift* – “the careful and wise use of money and other resources” (Podkalicka and Potts 2014: 227)<sup>4</sup> – is an ethical disposition and practice that our participants tend to share. Thrift appears to be a primary factor in consumption decisions, rooted not simply in anxieties about economic precarity and debt, but a choice exercised in relation to care ethics, responsibility for the household economy and aspiration. Therefore, understanding ethical consumption in the Western Cape requires an understanding of everyday, locally meaningful ethical practices. The paper concludes with reflections on the wider implications of these findings which, while still exploratory and relatively modest in scale, suggest there is a need to theorise ethical consumption from contexts in the global South, on their own terms.

[Figure 1 near here]

## **2. Global middle classes, the 'new African consumer' and emerging questions of ethics**

Initial interest in a 'global middle class' was focused upon the emergence of new consumer classes in the BRIC countries (Brazil/Russia/India/China) and their potential to boost global

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<sup>3</sup> The meanings of middle class are also a topic of popular debate in South Africa; see, for example, <http://mg.co.za/article/2014-09-25-what-its-like-to-be-young-black-and-in-the-middle>.

<sup>4</sup> The etymology of thrift derives from Old Norse meaning the condition of 'thriving' (Podkalicka and Potts 2014:229).

economic growth through consumption (Kharas and Gertz 2010; Mawdsley 2004).<sup>5</sup> More recently, since the down-turn in the global economy from 2008 and slowing of growth in the BRICs, numerous strategic briefs and equity research notes (see, for example, McKinsey (Leke et al. 2010); Goldman Sachs (2012); Deloitte (2013)) have given rise to a second popular discourse concerning the ‘new African consumer’. This relies on defining a ‘new’ middle class through purchasing power parity (Deloitte 2013). Thus, the African Development Bank (AfDB 2011) defines the African middle class as those spending between US\$2 and US\$20 a day. Rather than merely hovering above the poverty line, anyone spending more than US\$2 a day is now elevated discursively into the ranks of the burgeoning global middle classes in which so much economic hope is invested. Almost overnight, the African continent ceased to be “Hopeless Africa”, to be avoided at all costs by international investors (*The Economist* 2000; cf. Versi 2000). Instead, its newly defined, 313 million-strong middle class puts it on a par with India and China, giving rise to new media reports proclaiming “Africa is the new Asia” (*Newsweek* 2010) and the “The Hopeful Continent” (*The Economist*, 2011; see also Smith and Lambie 2011). In addition, the benighted African Other – characterised by “brutality, despotism and corruption” (*The Economist* 2000) – turns out to be just like ‘us’: “Africans are also aspirational. African consumers want the same as consumers elsewhere – a mobile phone, a bank account, and the latest Beyonce CD bought in a store at a shopping mall (Deloitte 2013: 4). As Enaudeau (2013) wryly observes:

In a time when growth rates of industrialized countries stutter and when the Chinese and Indian engines of the global economy are somewhat slowing down, financial analysts and investment consultants can’t get enough of the one thing that they have dismissed for so long: Africa... Close your eyes and let your imagination do the rest: hundreds of millions of purses loosening their strings.

Africa, discursively homogenized, but with its apparently burgeoning middle classes, is thus considered ripe for consumer-focused investment.<sup>6</sup> Coinciding with this is an assumption in

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<sup>5</sup> A parallel debate concerns the relationship between a growing middle class, good governance and stable political institutions (e.g. Birdsall 2010).

<sup>6</sup> Even Kofi Annan (2012: 6) advises caution: “The extreme pessimism surrounding Africa a decade ago was unwarranted. So, too, is the current wave of blinkered optimism”.

parts of mainstream international development that the adoption of macro-economic policies that favour the middle class lays the foundation for more economically and politically sustainable development (Birdsall 2007). This has given rise to newer forms of middle class boosterism in which state-sponsored private development is “aimed squarely at, and expressly for, the middle classes”; in other words, new neoliberal state practices are “directly and indirectly being used to promote the interests of the new, individuated, ‘self-made’, entrepreneurial middle classes” (Heiman et al. 2012: 16) in order to create the ideal ‘consumer-citizens’ (Fernandes 2006).

South Africa has not been immune from this trend. Since the ending of apartheid in 1994, South African governments have promoted ‘black economic empowerment’ (BEE), defined as black<sup>7</sup> people gaining access to corporate ownership and management roles that give them equal access to scarce resources (Murray 2000). This has enabled the growth of black middle classes (including public sector white-collar workers and wealthy business owners), which are seen strategically as the vanguard for the integration of black people into mainstream economy and for fighting poverty (Iheduru 2004; McEwan and Bek 2006). However, BEE (including the Broad-Based BEE Act of 2003 that sought to distribute wealth across a broader spectrum of previously disadvantaged South Africans) has been roundly criticized as a means to guarantee the enrichment of a few, already relatively privileged, black people who display their status through conspicuous consumption (Posel 2010), while the living standards of the vast majority have not improved and, in many cases, have declined (Bond 1997; Ponte *et al.* 2007; Mbeke 2009; *cf.* Patel and Graham 2012).

These strategies of middle class boosterism in South Africa and other emerging economies rely on an age-old faith in the potential of middle classes to fuel economic growth and transformation (Banerjee and Duflo 2008). The role of middle class consumerism has also long been recognized, with their willingness to pay more for quality goods feeding investment in production and marketing, and supposedly raising income levels for everyone (Murphy, Shleifer and Vishny 1989; Schor 1999; Banerjee and Duflo 2008). However, much of the economic debate about the global middle classes has a tendency to generalize and stereotype, overlooking

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<sup>7</sup> In legislative terms ‘black’ refers to all people of colour, but initial government statements about BEE indicated a clear preference for black Africans. This proved controversial, particularly in the Western Cape, since it would be unlawful to discriminate against Coloured people in any BEE initiative and counterproductive given that Coloureds and Indians compose 55% of the Western Cape population. Consequently, government ministers are keen to stress that ‘black’ is an inclusive term. According to Mxolisi Buthelesi, former Director of Trade and Industry, “the beneficiaries of BEE interventions should... be [all] South African citizens who are: Blacks (African, Coloured and Indians)...” (ANC 2002, in McEwan and Bek 2006: 1026).

the diversity of the middle classes within and between countries. As Chen and Goodman (2013: 11) argue, “There is a common view that the middle classes are homogeneous, and that this homogeneity is not only true within a particular society, but also globally”. This arises from a tendency to define middle class through income or purchasing power, with western-style consumption as the key attribute, which in turn produces a flattened sense of the global middle classes.<sup>8</sup> In contrast, recent sociological and ethnographical research has begun to highlight the heterogeneity of the middle classes and how differential positioning in labour markets creates considerably different spending power and conflicting interests (e.g. Cheng Li (2010) and Lieberthal (2010) on China’s diverse economic, political and cultural/educational elites; Cohen (2004) on Morocco’s increasingly fragmented middle classes).

Despite this emerging sensitivity to difference, there is still a tendency in much academic literature to make a distinction between the ‘traditional’ (often comprising the professional, compradore and/or petit bourgeois classes in post-colonial contexts) and the ‘new’ middle classes (defined by either income or expenditure; see note 1) (Fernandes 2006; Kharas 2010; Kharas and Gertz 2010; Lange and Meier 2009). In South Africa and other post-colonial societies, the ‘new’ middle classes are typically in government or corporate employment, share many of the characteristics of the working classes (having no direct ownership of the means of production, being in a subordinate relationship to capital-owning employers), but often enjoy a higher income than members of the ‘traditional’ middle classes (Southall 2004). Clearly, the ‘new’ middle classes are emerging in quite different contexts in the 21<sup>st</sup> century to those that emerged, for example, in South Korea in the 1980s and 1990s, where strong labour movements translated productivity gains into higher wages, or in other East Asian ‘tiger’ economies where export earnings were translated into relatively egalitarian mass-consumption domestic economies (Davis 2006; Prashad 2007). In contrast, the ‘new’ middle classes are seen by some critics not as the standard bearers of rising living standards and widespread development, but of escalating global inequality, reflected in the contrast between the growing numbers engaging in commodity consumption and the many more who still struggle to survive. For other critics, one commonality the ‘new’ middle classes share is that very often they are only slightly above the poverty line and vulnerable to falling back into poverty (Guarín and Knorringa 2014).

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<sup>8</sup> Birdsall’s (2010) exploration of the impacts of the new middle classes on politics is one exception.



Attempts to generalise about the global middle classes mask the complex and diverse ways in which they are positioned in relation to consumption, particularly the values and ethics that influence consumption practices, which in turn has had negative economic consequences in some countries. For example, Bijapurkar (2008) argues that failure to understand the diversity of India's middle classes, their extreme value consciousness (a concern not only with affordability, but qualities such as brand image, reputation, trustworthiness and reliability) and their level of market/consumer knowledge in being able to discern 'good value', alongside a tendency to base assumptions about their consumption patterns on Northern models, led to considerable investment failures in India for some of the biggest global corporations. Bijapurkar's insistence that investors learn *from India on its terms* has wider applicability, particularly in generating more nuanced and contextualised understandings of how ethics shape consumption in the global South.

This question of ethical consumption in the global South remains relatively neglected (*cf.* Gregson et al. 2010; Yeh and Lama 2013). What little research exists has tended to draw distinctions between the values and morals of 'traditional' middle classes, who are often associated ideologically with relatively collectivist, national modernization paradigms, and the 'new' neoliberal middle classes, who are assumed to be "organized around ideologies of global 'free trade', individual entrepreneurial success, and unabashed assertions of private property" (Heiman et al. 2012: 15). Thus, while some economists hail the promise of the newly affluent consumers in the global South, others warn of their unfettered consumption creating "a catastrophe" for a sustainable future (OECD Observer 2007/2008). Moreover, their cosmopolitanism is seen as confined to financial and cultural capital accumulation, and not extending to an interest in the Other and/or others, with care of the self and seeing/being seen considered more important than consuming ethically (Brosius 2011). These generalising perspectives are also sometimes shared by experts within emerging economies; India's new middle classes, for example, have been condemned as "consumerist predators" marked by "complete insensitivity to any social concern" (Varma 1998, in Lange and Meier 2009: 4). It has only recently been acknowledged that diverse socio-economic positionings and cultural influences within the middle classes shape consumption, both across and within nation-states (e.g. Hanser (2010); Tiam and Dong (2010); Beng Huat (2003)), but there is still a need for

deeper understandings of how ethical interpretations and behaviour differ in various consumer markets around the world (Belk et al. 2005).

Apart from a few attempts to challenge stereotypes by considering the globalizing lifestyles of the new middle classes in the context of environmental concerns (Mawdsley 2004; Lange and Meier 2009), the notion that ethical decision-making informs middle class consumption in complex and culturally-specific ways has been largely neglected. In part, this comes from defining ethical consumption through environmental and social concerns, which limits the means by which consumers might be defined as ethical (Barnett *et al.* 2005; Hall 2011) and overlooks everyday ethical behaviour. In part, this also reflects the tendency within ethical consumption debates to locate the ethical consumer in the global North. In contrast:

[T]he new middle classes are accused of lacking any sense of responsibility regarding both societal and environmental needs. They are reproached for being passive, short-sighted and naïve consumers attracted by simple messages of consumption and unable to reflect critically on their shortcomings. (Lange and Meier 2009: 4)

There is more than an echo of both bourgeois derision or patrician disdain towards ‘new’ middle class materialism and colonial discourses about the ‘unenlightened Other’ informing these perspectives. In response, recent research into ethical consumption in the global South has sought to develop more contextualised approaches (Dombos 2008; Lange and Meier 2009; Gupta and Hodges 2012; Hong and Song 2010; Bryant and Goodman 2013). However, much of this tends to assume that business and consumer ethics travel from the global North before engaging with localized forms of consumption, and takes as its starting point a limited notion of ethicality as environmental and social responsibility,<sup>9</sup> neglecting “consumption as an everyday ethical practice” (Hall 2011: 627).

In summary, three issues are striking from debates about ‘new’ middle class consumption in the global South. The first is the tendency, particularly within economic discourse, towards generalisation in the desire to construct a commensurable economic category: the ‘global middle class’. The second is a tendency to overlook the significance of the different contexts in which

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<sup>9</sup> One exception is Cartier’s work on China (2009; 2013), which points to the incommensurability of Northern consumer ethics with localised cultures of consumption.

these new middle classes are emerging, in particular their relationship to cultures of consumption and precarity of labour, and to assume that they will deliver economic benefits in similar ways to the emergence of middle classes in other parts of the world. The third, and most pertinent for this paper, is the relative absence of knowledge about everyday consumption by these new middle classes and the ethical decisions and practices informing this. There is a need, therefore, for a more nuanced and contextualized understanding of middle class consumption and the ways in which it is imbued with ethical choices and moral decision-making. This also means avoiding the projection of narrow understandings of ethicality as social and environmental responsibility onto the global South (Slater 2010), and challenging notions that the ‘new African consumer’ will behave like its Northern middle class counterpart in a willingness to pay more in the interests of sustainable consumption. Through a case study of middle classes in the Western Cape, the following discussion illustrates that the complexities of consumption cannot be reduced to qualities pertaining to the ‘new’ or ‘traditional’ middle classes, which in South Africa is mapped largely onto ‘racial’ difference. Instead, diverse middle class consumers often share ethical values that shape consumption in very distinct ways and challenge some of the generalizations about the ‘global middle class’ within contemporary business and popular media.

### **3. South Africa’s middle class consumers**

Post-apartheid South Africa remains a structurally unequal society in which class-based inequality is often still racialised (principally, the poorest remain almost exclusively black) (Seekings and Nattrass 2005). The racial composition of the upper classes has been transformed by the emergence of very-affluent black individuals (Visagie 2013a) – the so-called ‘Black Diamonds’, who are often referred to in the media as middle class. However, whatever metrics are used (occupation, per capita household income, income measures based on life-style and status), the most significant socio-economic shift since the end of apartheid in 1994 has seen the growth of the wider black middle classes<sup>10</sup> (Rivero et al. 2003; Southall 2004; Udjo 2009; Visagie 2013a; 2013b), who are assumed to be taking their place among the ‘new African consumers’ (Deloitte 2013; AfDB 2011). There has been much criticism of the enrichment of the

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<sup>10</sup> Nineteenth century British colonialism fostered the emergence of a black middle class (the *amakholwa*, or ‘civilised ones’) in South Africa (Ndletyana 2014), but this was first disenfranchised in 1936 and progressively dispossessed and impoverished under apartheid; see, for example, <http://mg.co.za/article/2014-09-25-once-we-were-the-madondos-the-special-ones>.

‘Black Diamonds’ through BEE and of their conspicuous consumption, but only a few studies have sought to understand middle class consumption – in South Africa and in other post-colonial contexts – in relation to historically oppressive workings of race that “regulated people’s relationships to things and the symbolic politics thereof” (Posel 2010: 160). Although there is emerging debate about the difference between objective and subjective notions of class (Burger, Steenekamp et al. 2015), South Africa’s middle classes are often understood as “the consumer class[es]” (Kharas 2010: 5; see also Visagie and Posel 2013), which is as much a social designation as an economic category. However, defining the middle classes as having the ability to lead a comfortable life (Kharas 2010: 7) – enjoying stable housing, healthcare and educational opportunities for their children, reasonable retirement and job security, and discretionary income that can be spent on vacation and leisure pursuits – is not strictly applicable in the context of South Africa. Here middle class status is complicated by low average and median income levels and the very concentrated distribution of income in the very-affluent middle (or upper) classes. In fact, 75% of South Africa’s population falls below the middle class income spectrum (Visagie 2013b). Consequently, households that have achieved only a modest standard of living are in reality near the top of the country’s income ladder. For this reason, definitions of middle class based on expenditure measures that would include blue collar workers are rejected in South Africa, with preference for definitions based on white-collar employment and income status between R10,000 (c.£540) and R25,000 (c.£1,370) per month (Ndletyana 2014).

Since the median middle class in terms of income distribution is relatively poor, the South African middle class consumer is synonymous with both the affluent and very affluent (Visagie 2013a), who make up less than 20% of the population. The “missing middle” – those who are neither affluent nor poor (Lemanski and Tawa Lama-Rewal 2013: 96) – points to a need to differentiate between the actual (median) and affluent middle-class (Visagie 2014). This is one reason why the South African Audience Research Foundation’s (SAARF) Living Standards Measure (LSM)<sup>11</sup> has become a popular means of identifying middle-class consumers and is now the most widely used marketing research tool in Southern Africa. It divides the population into 10 LSM groups, from 10 (highest) to 1 (lowest).<sup>12</sup> It is seen as a significant means of segmenting

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<sup>11</sup> <http://www.saarf.co.za/LSM/lsm.asp> (accessed 03/04/14).

<sup>12</sup> The 10 categories are not deciles (6-10 represent about a third of the population, for example), but differentiate between people with different behaviour patterns and group together those people with similar behaviour patterns. The LSM bands are not entirely rigid because they create contiguous and sometimes slightly overlapping groups.

the South African market because it cuts across ‘race’ and other outmoded categorisations. Instead, it groups consumers according to 29 indicators of living standards, including degree of urbanization, ownership of cars, major appliances, consumer and leisure goods, and ability to pay for services.<sup>13</sup> The LSM is thus a wealth measure based on standard of living rather than income (Haupt n.d.). Although LSMs are not psychographic or attitudinal measures (they segregate markets in terms of possession of commodities, but cannot determine whether or not particular groups are predisposed towards spending money), LSM groups 7-10 are of particular interest to market analysts in South Africa. This is because “they enjoy the best standards of living, earn the highest salaries, consume the most media and are most likely to appear as the target audience on many a marketing plan” (Chronis 2012).

Over recent years the LSM 7-10 segment of the population has grown by almost 60% from below 6.5 million (22% of the adult population) in 2001 to over 12 million (35% of the adult population) in 2011 (Chronis 2012). Moreover, LSM 7-10 has become younger, with the numbers of 15-24 years olds increasing from 20% to over 25% between 2001 and 2011. Its ethnic profile has also shifted markedly, with black South Africans increasing proportionately from 19% in 2001 to over 47% in 2011 and whites declining from 58% to 32% over the same period, reflecting the emergence of the black middle and upper classes (*ibid.*). Perhaps unsurprisingly, in addition to their high standard of living, the vast majority of LSM 7-10s also come from households with higher than average monthly incomes, with a third having a monthly income of over R20,000 (circa £1,100). In terms of geographical location, most LSM 7-10s live in Gauteng (39%, accounting for just below 60% of the province’s population) and the Western Cape (18.5%, accounting for 63.6% of the province’s population) (Chronis 2012). The Western Cape, therefore, is a relatively affluent province in which a large proportion of the population is considered to be middle class.

Beyond the fact that South Africa’s LSM 7-10 has become much larger and, on average, much younger and more ethnically diverse, very little is known about their attitudes towards and

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<sup>13</sup> Initially LSMs correlated highly with ethnicity, reflecting the realities of inequality in South Africa, with most black people falling into LSM 1 to 6 and the higher LSMs being multiracial. However, the influence of ethnicity over time as a differentiating variable has declined slightly, as has its correlation with LSMs, reflecting the growth of the black middle classes since 1994 (Haupt, n.d.).

practices of consumption.<sup>14</sup> More specifically, as with the global middle classes more broadly, there is little understanding of the extent to which consumer choice is affected by ethics or how consumers deal with the ethical dilemmas influencing many of their everyday purchasing decisions and household strategies. Thus, in response to calls for a deeper understanding of ethical interpretations and behaviour in global South contexts (Belk et al. 2005), the ensuing discussion attends to everyday ethical consumption in the Western Cape. It draws largely from the focus groups in which participants were asked to talk about the factors influencing everyday consumption, including shopping and household consumption. The discussions indicate that while social and environmental considerations are rarely prioritized, thrift is a core practice that many participants share. Far from being either individuated, ethically-blind consumers, or consumers who perform ethics solely through conspicuous or ‘politically correct’ consumption, our diverse participants share concerns with thrift as both an ethical practice and economic strategy, which they articulate in relation to care for family and friends, as well as aspiration.

#### **4. Middle class consumption ethics: thrift, care and aspiration**

Barnett *et al* (2011) argue that there is a need to recognise the embeddedness of ethical consumption in everyday practices of social reproduction. In what follows, we outline the ways in which our findings in the Western Cape support this contention. In particular, we suggest that practices of social reproduction involving everyday ethics and thrift are themselves worthy of deeper consideration as particular forms of ethical consumption. Middle class consumers have often been associated with values such as thrift (Kharas 2010), although this has very often been thought of as instrumental rather than ethical. Recent research in geography and sociology has begun to revisit thrift *as ethics* (Evans 2011; Hall 2011; Schor 2010; Yates and Hunter 2011), but this has focused exclusively on consumption in global North contexts. Thrift is potentially messy ethics: it differs from frugality because it involves a concern with maximising not reducing consumption and it raises questions about whether or not it is wrong to save money at the expense of others, or to bargain-hunt if one is not poor. However, of significance here are the

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<sup>14</sup> One exception is Kaus (2013), which suggests that Coloured and Black households are found to spend on average about 35 to 50% more on visible consumption (clothing, footwear, jewellery, cars) than comparable White households.

diverse ways in which our participants perceive price, quality and responsibility as ethical choices, and negotiate the everyday dilemmas posed by the tensions between these. As the following illustrates, thrift is variously articulated in relation to economic constraint, care for proximate others, habit, and status and aspiration.

#### *4.1 Thrift as economic constraint?*

Our research confirms that thrift is a dominant influence shaping middle class consumption in the Western Cape. One of the reasons for this is embedded in the peculiarities of South Africa's middle classes (discussed previously), which if defined solely as LSM groups 7-10 still include a diverse range of people, the majority of whom are either still relatively cash- and asset-poor or asset-rich/cash-poor. The constraints on middle class budgets and the importance of thrift in shaping everyday consumption are well understood within businesses in the Western Cape. As a consultant in sustainable business management explains:

The reality is that the vast majority of South African consumers watch their money so, so closely. I mean you have to... 70% of the population lives on a household income of R5,000 a month which is what? [c. £288]. The middle class gets squeezed in every respect. So they've got assets and they tick a lot of boxes on paper but the reality is that disposable income and what they actually have to spend is still incredibly low. They are prioritising, they've got the DSTV or their Skybox or whatever, you know. They might have a decent car, but they are eating badly... (Interview 21/03/14)

This suggests that thrifty everyday consumption may be necessary to make conspicuous consumption affordable (Kaus 2013). There is also a significant debt problem in South Africa, precipitated in part by the extension of credit after 1994 to those previously denied it, and profligate and extortionate lending to those desiring not simply materialist consumption, but what they feel is necessary for a good life (James 2014a; 2014b). While none of our participants raise the issue of debt,<sup>15</sup> analyses have shown that salary- or wage-earning consumers are most likely to be over-indebted, that by 2008 white consumers owed more than black consumers, but

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<sup>15</sup> We acknowledge that while focus group methodologies are common in studies of consumption practices, they can inhibit discussion of sensitive issues such as debt.

that the new middle classes (mainly public-sector employees) are subject to greater vulnerability (Burger, Louw et al. 2015), including exposure to unregulated and informal micro-lending. As James (*ibid.*) has shown, indebtedness among black middle classes is very often not the result of profligacy and irrational consumption, but of prudence and strategies for meeting extensive communal obligations.

Relatively high costs of living (and possibly debt levels), as well as the status attached to visible consumer goods (e.g. clothes, footwear, cars, jewellery) (Posel 2010), provide an important context for explaining everyday thrift among our focus group participants. In this case, thrift behaviour relates not only to ‘the economy of scarcity’ (Strasser 1999 in Lehtonen and Pantzar 2002), but is practiced in the “midst of plenty” (Podkalicka and Potts 2014: 231). All of our focus groups reveal that consumers are making sacrifices in everyday consumption to prioritise both family obligations and commodity ownership that defines their living standards, and these considerations often outweigh other ethical decisions. This poses challenges for promoting socially and environmentally ethical consumption in South Africa. For example, the marketing manager of a company selling ethical dairy products explains that the consumer base is small because the tolerance for paying a premium for ethical products is relatively fragile:

[We market to the] top [LSM] 9-10 where people can afford the extra Rand if they want to on milk when they’ve got accommodation and housing and they are relatively comfortable. We did a lot of research on the people who are in the position to [and] they would support something dealing with the greater good even at a slight price premium now... Unfortunately it’s not as big as we hoped it would be. It would be maybe 50 cents. (Interview 28 March 2014)

This is confirmed by some participants who feel that paying more for ‘green’ products is wasteful: “Buying an organic thing for R10 when you can get the same for R5 or R2. It’s just like wasting money” (Female Research Council researcher, Cape Town City). Even an environmental educator finds making ethical choices:



Very difficult, because if [chocolate] in the supermarket costs R25 and there's some chocolate that really has got the right label and stamps saying they are not child laboured, then I would probably still go for the R25 [chocolate]. (FG4 Bredasdorp)

Prioritising spending on cheaper goods is thus articulated as an ethical choice not to waste money and an unwillingness to pay more for 'sustainable' goods (Evans 2011). As the Director of an ethical business consultancy explains, "There is a perception that if it is done ethically or more sustainably then it must be more expensive... You are only ever going to attract a certain type of people" (Interview 01/10/13).

Amongst our participants, the ethics of responsible household budgeting tend to be prioritised over other forms of ethical consumption. Financial constraints are mentioned frequently; as one participant explains, choices are limited by "Just finances. I think that price is massively important to me before any other consideration involved (Female Research Council researcher FG6 Cape Town City). Several participants discuss locally-specific ethical dilemmas that consumers face due to budgetary constraints. As an Executive Chef argues, even for the middle classes, South Africa "is an expensive place to live if you earn a salary in Rands; it is not the easiest place to make ends meet". Consequently, "The only choice they [consumers] make is 'what is the cheapest, what can I get for this amount of money'" (Interview, 07/10/13). Consumers who are able to do so spend a little more and buy from retailers with reputations for better quality and ethically-sourced goods, but caution over spending means that quality of most everyday goods is often a secondary concern. A company secretary explains that she and her husband "don't shop for the quality of the product" because "quality products are a bit more pricey and not always possible for the common person to buy" (FG2 Croyden). Similarly, a teacher argues: "if you work with a budget like most of us have to, I think that price is probably first and foremost" (FG4 Bredasdorp). Another participant explains:

Not all of us have the same money in our pockets, so for me and my family price is very important. But of course as you shop you are aware of the difference in price for maybe the same product, you are aware of different brands and so yes I do tend to think that higher prices are for better products [laughs], which I would sometimes like to buy but cannot afford. (Female company secretary, FG2 Croyden)

What is striking about all of these participants is that they are relatively affluent – many own houses and cars and all are in skilled employment – but they exercise extreme care in everyday consumption. More ethnographic research is needed to understand this voluntary thrift in the midst of relative plenty among South Africa’s middle classes, but we suggest that it emerges from two implicitly ethical concerns. The first relates to a desire to manage household finances, which may be rooted a fear of debt (James 2014), but also relates to the ability to maintain or attain standards of living through commodity consumption. The latter appears to be shared across our participants, rather than being tied to whether or not people are defined as ‘traditional’ or ‘new’ middle classes. The second relates to thrift carrying “a signal, presumably intended to be observed, about the moral qualities (and not just economic qualities)” (Podkalicka and Potts 2014: 231) of the middle class consumer. While not articulated explicitly as ethical consumption, consumption choices for many of our participants emerge from a desire to appear to be ‘doing the right thing’, which has ethical outcomes such as responsible budgeting and not wasting money. We develop these ideas in the following discussion, which illustrates that thrift is culturally embedded economic behaviour where ‘doing the right thing’ is rooted in care ethics that shape consumption choices.

#### *4.2 Thrift as ethics of care for proximate others*

As discussed above, concern with price is common among middle class consumers in the Western Cape, but this is not necessarily frugality since thrift and frugality involve a different articulation of ethics. Whilst frugality in consumption might mean not spending or reducing consumption (and thus might relate to broader environmental ethics), thrift has been theorised as spending wisely and resourcefully in the present in order to maximise lifetime consumption (Podkalicka and Potts 2014: 228; see also Gregson and Crewe 2003). As Evans (2011: 551) argues, the distinction between the two lies with the “different scales of care and compassion that are mobilised through the (non)consumption practices associated with each”. Frugality requires personal sacrifice often in the interests of a greater good (such as environmental sustainability) or an ethical concern with distant others (for example, strangers or future generations). Thrift is essentially the art of doing more with less, including bargain-hunting, seeking out special offers and bulk-buying, all of which feature as priorities in the consumption decisions of our

participants. However, this is not simply a case of thrift as a Certeauian ‘l’art de faire’ (making do or Indian *jugaad* or Cuban *resolviendo*); it is a concern with preserving household resources and restraining household expenditure to free up resources for other kinds of consumption “as a means to act morally towards significant others” (Evans 2011: 551), specifically immediate family and friends. Indeed, as Miller (1998) argues, shopping practices can be a normative and profound expression of love within families.

Our findings suggest that even among very affluent consumers, bargain-hunting and bulk buying of staple products<sup>16</sup> is common and part of a set of practices of social reproduction that helps free up resources to be directed towards care for others. A majority of respondents are willing to shop around for better prices. As one respondent puts it:

I buy anywhere and I hunt the best price and will shop wherever actually. They have a sale or items on discount I will go to those shops and buy different products... (Female health-spa worker, FG1 Cloeteville)

This response is typical across cultural and generational differences. Relatively few participants are willing to pay higher prices regularly for higher quality staple goods and seeking out the cheapest available products and bulk-buying is the main priority. Most are thus content to sacrifice quality of staple goods in the interests of the greater good of the family (Capellini and Parsons 2012). Providing a good quality education for their children by making sacrifices elsewhere is one commonly articulated way in which parents are concerned with acting morally towards family members. For example, one participant explains:

We have three children at university, which is an immensely expensive kind of business so economics is first and foremost. I mean, we earn a salary and there’s a budget that you have to work with and so [pauses], I think it’s, at this stage of my life, where I am, economics is the first and foremost. (Female teacher FG4 Bredasdorp)

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<sup>16</sup> By staple products, we mean those purchased routinely by participants. These include food, everyday items, household goods and cleaning materials. There was little difference between the focus groups in terms of what was considered a staple or everyday item.

However, the most important outcome of economising on staple goods among our participants appears to be the greater flexibility this provides to prioritise buying better quality fresh meat and produce, specifically when shopping for family and friends. For example, the vast majority of participants stress that they would pay more for quality fresh food items, especially meat and fresh fruit and vegetables, as well as shop at the more expensive outlets, such as Woolworths.<sup>17</sup>

As one participant explains:

[With] dry consumables, there I will look at price..., whoever is the cheapest it does not matter to me. But my fresh produce I will look at the quality first. Even the meat I buy. I will rather look at the quality and how fresh it is... Ok I won't pay a 100 Rand for a piece of steak, but I won't pay 35 Rand for steak and then it taste like crap and I got to throw it away. (Female HR Manager, FG2 Croyden)

Another participant discussed the avoidance of a particular retailer with a reputation for poor quality fresh produce:

Let's say I need to get meat and it's a discounted meat. The cheaper product can't be kept in the fridge for more than 2 days. You have to cook and eat the meat immediately. Because there is a catch in the discounted products. They then over-spice the meat. (Male pensioner, FG1 Cloeteville)

Providing good quality fresh food for family members is intertwined with being a 'good' parent, spouse/partner or son/daughter and an expression of love.

Habit and avoidance of waste also emerge as essential to ethical behaviour, with several respondents discussing practises inherited from less affluent parents. For example, one participant – a highly educated, professional black woman in her twenties from a relatively poor background – discusses re-using cooking oil:

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<sup>17</sup> Woolworths occupies an upmarket, high-end niche in South African retailing (not to be confused with the now defunct UK high street retailer), but has recently also marketed aggressively to attract value-oriented black middle classes. It models its 'Good Business Journey' directly on UK retailer Marks and Spencer's 'Plan A', which aims to be the world's most sustainable major retailer through sourcing responsibly, reducing waste and helping communities. Since 2007, Woolworths has used this to successfully promote an ethical corporate image (Interview with Good Business Journey Project Manager, 26/03/14).

At the moment I live with my husband's family and I hear things like "you can't use oil so many times because", just because. It's craziness.. [I say] "It's still good, why are you trying to waste [the oil]? Because the small stuff that you put on the table doesn't look as nice as it looked two weeks ago?" You know? It doesn't make sense. It's wasting... The thing of using the oil over and over was also my mum's too. My mum would like to use it again. (Female HR Manager, FG2 Croyden)

Other cross-generational household consumption practices mentioned by several respondents in different focus groups, such as covering water geysers to save electricity, re-using water and growing vegetables, are expressed as ethical concerns with avoiding waste and/or saving money. As one participant explains, having a "veggie garden" is "not as much about the environment, but how it affects your pocket" (Female teacher, FG4 Bredasdorp). This illustrates some of the problems with generalizing discourses about the difference between 'new' and 'traditional' middle classes. Not only do diverse middle class people in the Western Cape share a concern with thrift that challenges the idea that the 'new' middle class consumers are likely to be less ethical, these values cut across class, ethnic and cultural difference and have endured over time. Significantly, concern with waste is not expressed as a concern with excessive consumption and creating waste; rather it is a concern with wasting money that might be better used in moral acts of care and responsibility towards the family expressed through other types of consumption. However, these everyday thrift practices may also have unintended ethical outcomes relating, for example, to environmental issues such as energy and water consumption.

Thrift in these examples allows consumers to make choices. Economising in some areas allows for prioritising the purchase of good quality meat and fresh produce, or in focusing resources in other areas, such as children's education. This is a responsibility and expression of care towards both household budgets and family that our research suggests is deeply-rooted and shared across cultural and generational difference. It also appears that across our focus groups thrift is habitual (Jackson 2005). None of our participants discuss thrift as a new practice in response to changing circumstances, but several describe thrift as part of their upbringing or as simply something they practice, which explains why thrift endures even among relatively affluent people. It must be acknowledged, of course, that the capacity for thrift behaviour often

emerges from relative economic advantage. For example, it is difficult to buy in bulk without access to a car and shopping around for bargains requires the luxury of time very often unavailable to members of households under extreme economic duress. Thus, ‘doing the right thing’ is also an expression of *capability* and *ability* to do the right thing, which in turn is an assertion of status that links thrift with aspiration.

#### *4.3 Cool thrift: ethics and aspiration*

The increasing role of aspirational consumption and of ‘consuming to become’ (Mansvelt, 2005) is influencing the changing pathways of ethical consumption in South Africa. Market analysts suggest that status and image are becoming more important as the middle classes expand and become younger in profile (see also Kaus 2013). As Burger, Louw *et al.* (2015) argue, consumption patterns of the emerging black middle classes are often concerned with greater signalling of social status via visible consumption and preoccupation with reducing historical asset deficit. As a company marketing manager explains:

There is a growing middle class and people like... something that is different in the store. You know, the status symbols occur throughout a spectrum of what you buy from very small things to houses and cars and watches and those sorts of things and when Red Bull came into the market and charged R20 to sell a little bottle that was a status symbol... This is something that... different people notice in their trolleys. (Interview 28 March 2014)

Despite this, our findings suggest that only a minority of participants is willing to pay more for branded goods when purchasing everyday items; significantly, they tend to be younger. For example, the following is a discussion with two men in their 20s, who were asked whether or not price or quality is more important:

R2: Quality (flower company worker)

R1: Quality (construction worker)

Researcher: For both of you?

R2: Quality yes... I don't really worry about how much it costs, I go after the quality of the product.

R1: That's right

Researcher: How do you know that it is a quality product?

R1: I check the price, if it's higher than rest of products on shelf, then I feel I am buying a quality product.

R1: It's almost like our young people, we don't want a pair of common *tekkies* [sport shoes] we want a brand name shoe.

R2: Yes, extra price you are willing to pay for the product. And it will last much longer than a cheaper product.

R1: Yes, you know it's worth the price, as it is quality. It has a brand name, good stitching and an almost 'stamp of approval' extra label on it. Then you know its quality.  
(FG3 Elim)

These were the only participants to suggest that brand names, status and image dictate their purchasing choices. Crucially, however, this choice of conspicuous consumption is still expressed in relation to quality and is underpinned by a rationale that paying more makes good economic sense by spending more on an item in order to buy it less frequently.

Some respondents who are unable to shop at more exclusive outlets, like Woolworths, are nonetheless aware of the association with status that comes with being able to do so. As one participant puts it, "In South Africa there are some people that... would still buy at Woolies [Woolworths] or whatever because it's this sort of status kind of consumption" (Female Research Council researcher, FG6 Cape Town City). As discussed previously, most participants are keen to stress they shop for quality when they have visitors, for example: "when I have visitors I don't want to compromise, I go to Woolworths!" (Male NGO worker, FG10 Newlands). This could be read as an ethic of care for family and friends, but is undoubtedly also about status: as Beneke (2010: 206) argues, the design of Woolworths' product packaging is "addressing consumer needs of esteem and status". The Woolworths brand is built on claims to socially and environmentally sustainable retailing and its target market comprises shoppers in the LSM 9-10 categories as well as aspirant shoppers from LSM 6-8 (Noble and Davey, 2008, in Beneke 2010). Our participants are aware of this and, irrespective of being 'new' or 'traditional' middle classes, being able to provide visitors with recognisably good-quality products is clearly important. This resonates with the idea of thrift not only as thriving, but also as a middle class

moral disposition “as much about identity as economics” (Capellini and Parsons 2012: 132). It also resonates with cool thrift as a “practice underpinned by cultural capital” (Podkalicka and Potts 2014: 232; see also Bryant and Goodman (2013) on “eco-chic”). In a context in which budgets are often constrained, being seen to be ‘doing the right thing’ is not simply a performance of conspicuous consumption, but of buying higher quality goods from reputable retailers that are also widely perceived to be ‘more ethical’. In these cases, anxiety about household budgets is outweighed by a concern with status and aspiration, often expressed in unexpected ways, with individual thrift behaviour producing a social gain in engendering social respect from peers (Podkalicka and Potts 2014).

It remains to be seen whether or not this will lead to enhanced possibilities for environmentally and socially ethical consumption, but some respondents, particularly those who prioritise environmental ethics, are not optimistic. For example, two employees at environmental NGOs express their frustration with family and friends who do not share their values, with a broader commentary on the ethics of the ‘new’ middle classes:

R1: Most of them, they don’t work in the environmental field. And many of us come from rural areas and they are making it like to lawyers and so on... They say ‘don’t tell me that I can’t eat...’

R2: “...it’s my time...”

R3: Yeah, “it’s my time... I’ve never had this kind of life. I’m having it now. Don’t tell me about environmental issues”. But sometimes they are actually greedy... With seafood [they say] “I’m sorry guys... I’ll have the sushi and I can afford it.” (Focus Group 10, Newlands)

There are thus some differences within South Africa’s middle classes concerning what ethical consumption means (eating sushi might variously be considered as unethical in environmental terms or an ethic of care of the self) and consumption choices that are perhaps generational or related to life stage. It may also be that ethical consumption will look quite different in the future. However, currently, while there are diverse practices of consumption in the Western Cape, there also appears to be much commonality in ethical attitudes, decision-making and motivations for consumption. Much of this is articulated around a concern with thrift and quality,



which in turn is expressed through an ethic of care for households and family members. These ethical proprieties are also intertwined with middle-class practices, subjectivities, moral economies of the self and concern with status, and they are “often imbued with affective traces of aspiration and anxiety and the desire for a feeling of security or belonging” (Heiman et al. 2012: 8).

## **5. Conclusions**

This paper has sought to challenge some of the generalizations about middle class consumption in the global South by arguing for a deeper consideration of ordinary ethical consumption practices in specific places. Thrift has long been associated with the ‘traditional’ middle classes, but less so in popular discourses about the ‘new’, consumerist middle classes. However, far from being individuated, careless and unethical consumers (Lange and Meier 2009), nearly all of our participants in the Western Cape, whether ‘new’ or ‘traditional’ middle classes, articulate concerns with thrift, expressed as both an ethic of care towards proximate others and careful, even habitual (Jackson 2005), management of household resources and budgets, as well as a performance of ethics related to wider concerns with status and identity. The choices they make are not necessarily claimed as ethical practice, but their everyday consumption is clearly informed by ethics and has diverse ethical outcomes.

The Western Cape is not representative of South Africa; it is also important to recognise the heterogeneity of the ‘global middle class’. However, important lessons can be learned from this case study about the need for more place-based and contextualized understandings of middle class consumption and consumer ethics. Specifically, there is a need to understand the complexities of the middle classes and the ways in which they practice ethical consumption, and to consider the role of ordinary ethics in shaping these practices. Thrift behaviour among the Western Cape’s diverse middle classes may relate to the relatively high cost of living and the economic vulnerability of some groups, but our findings suggest that thrift is also cultural and persists in voluntary forms – as an expression of care (Miller 1998), as habitual practice (Jackson 2005), as an expression of capability (Podkalicka and Potts 2014) – even when an individual’s access to wealth and income rises. This is just one example of the complex factors influencing consumption and the ethical decision-making that informs it. Revealing the everyday experiences and ordinary ethics of middle class consumers (Hall 2011), and teasing out the complex social

relations that underpin shopping practices in specific places (Miller 1998), are thus important in challenging generalizing claims made about the global middle class and their alleged rampant, irresponsible and unethical consumerism. There is thus a strong case for theorising ethical consumption from localities in the global South, on their own terms.

The interweaving of thrift with care ethics, status, habit and aspiration needs to be understood as an important context for middle class responses to other forms of ethical consumption. Although more research is needed to understand the relationship between thrifty everyday consumption and the politics and ethics of conspicuous consumption (Posel 2010), the distinction between ethical choice and economic necessity as a characteristic of thrift is not always in evidence in middle class consumption in the Western Cape. Material circumstances, shared values and personal histories shape consumption and, while structural and material constraints exist, there is still scope for the exercise of ethical choice. A great deal of faith is being invested by social and environmental activists and retailers in South Africa in the potential of the middle classes to drive consumption in sustainable directions, but ethical choices of consumers remain focused on more proximate ethics, with prudent budgeting and thrifty use of household resources being the primary concern. This suggests that a broader understanding of ethical consumption in global South contexts is required to understand the complex everyday ethical choices that people make and how these are shaped by immediate concerns and social relations, rather than simply assuming that ethical consumption will evolve in accordance with Northern norms. There is also a need to acknowledge that middle-class practices and ethics cannot simply be reduced to consumerism, but involve complex negotiations and decision-making shaped by thrift, care, aspiration and identity. Developing an understanding of this involves acknowledging the significant differences in income, precarity and lived experiences of people – within and across different locations – now routinely referred to as the ‘global middle class’, and how these differences shape ethical practices.

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